



## Best Practice for Patient Searches

WebIZ is a wonderful tool to use towards the goal of getting children properly immunized, but there are things all users must do to maintain its integrity. Not searching thoroughly enough often causes users to create duplicate records- and may lead to duplicate vaccinations!

### 1. General Requirements/Tips

- As a general rule, it is *recommended* that users search using a combination of 2 fields.
- If searching using a name, users must enter data in at least 2 name fields
- Users may search using *only* the date of birth (MM/DD/YYYY)
- Above all, **Search Smart!!** Any user who's searched for a patient in WebIZ has probably figured out there are a *lot* of Smith's, Hernandez's and Johnson's in this world!

**\*\*Example:** A user would definitely *not* want to search for last name "Smith", first name "A"; in this case, the user should elaborate on the first name. If the user knows the patient's name to be Ann, Anne or Angela, typing in "An" for the first name would narrow down the search- but not by much!! Remember- **search smart!**

### 2. Searching with a Name

- Users may search for a patient using the patient's name. When searching with a name (or part of a name), users must enter data in at least two (2) fields (i.e. users may not search using *just* a last or *just* a first).

**\*\*Example:** Last name & DOB, first name & DOB, last name & first name

- WebIZ performs a "wildcard" search using the information entered. This means that it looks for *everything* that matches or begins with the letters entered. The system will also display those with matching Alias Names (found in the Demographic screen).

**\*\*Example:** Entering "Johns" as a last name and "A" as the first name will display all patients with a last name of Johnston or Johnson, etc. *and* a first name that begins with the letter "A".

The wildcard feature is particularly helpful- any user could hit the wrong key, and many users have experienced a patient changing the spelling of their or their child's name. By entering only part of a name, users can account for these situations.

**\*\*Example:** "Johnson" may have accidentally been entered as "Johnnson" (see the extra "n"?); "Rachel" may have become "Rachael"

**In each of these situations, a user would *not* have found the patient record if the full name provided was used in the search.**

- If you cannot find a name the first time you search, try switching the last name and first name fields as sometimes they are entered incorrectly into the system. (This is especially important when dealing with names where you are not sure which name is the last name and which is the first name.)
- Often the hospital will enter the initial immunization record with the last name of the patient or mother's maiden name as "Baby Boy, "Baby Girl" as the first name. For example, "Baby Boy Smith". In each case double check to make sure the birthdate and gender match the patient you are looking for.

### 3. Searching with the WebIZ Patient #

When vaccinating a returning patient, a user may have the WebIZ Patient # documented in the patient's medical chart. In this case, the user would first search for the patient using just the Patient #. This is a unique identifier that should assist in easily finding the patient's record. If the user has searched using the number and still cannot find the record, then try a combination of the name or name and date of birth. Remember- if all users **search smart**, the database will be a better place!